

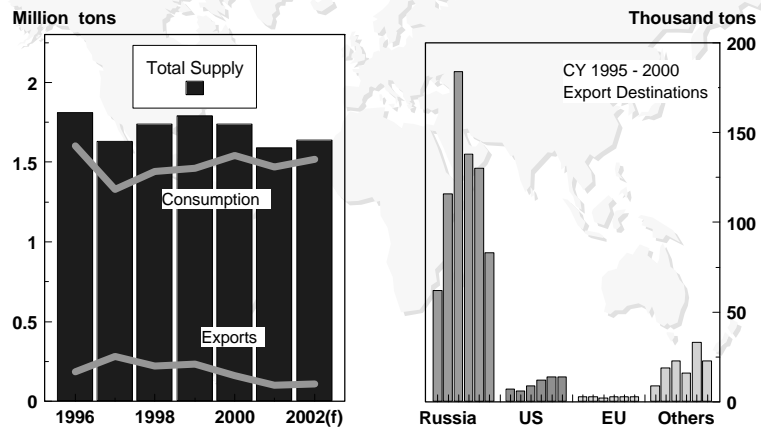
Poland's Swine and Pork Situation

	1996	1997	1998	1999	2000	2001(p)	2002 (f)
Swine (1,000 head)							
Total Supply*	43,649	42,298	44,100	43,176	40,527	40,238	41,800
Slaughter	23,580	21,335	23,050	23,250	21,800	20,950	22,000
Pork (1,000 tons; carcass weight equivalent)							
Production	1,684	1,540	1,650	1,675	1,620	1,550	1,620
Imports	50	41	74	55	47	22	17
Consumption	1,576	1,334	1,462	1,484	1,544	1,476	1,527
Exports	187	284	220	235	160	102	110
Ending stocks	57	20	62	73	36	30	30

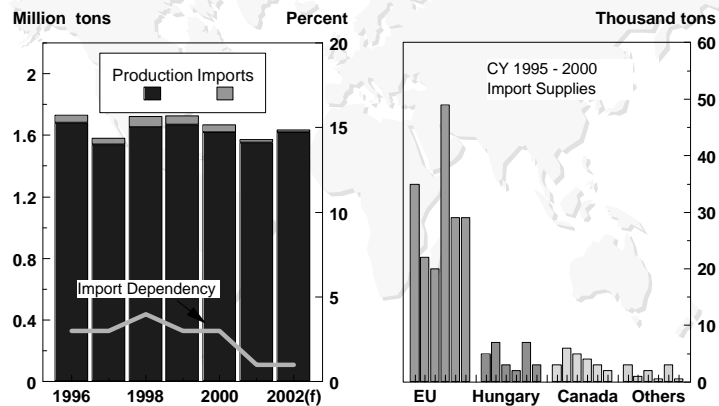
* Total supply = beginning inventories + pig crop + imports.

Poland's pork production for 2002 is forecast at 1.6 million tons, up 5 percent as producers capitalize on lower feed grain prices and begin recovery after 2 years of falling production. Pork is the primary meat produced in Poland, and demand is mostly satisfied with domestic production. Pork imports are not a significant part of consumption, and projected increased domestic supplies of pork for 2002 will constrain imports. Most of the imports originate from the EU. Poland's exports are forecast to increase in 2002, but still much below record levels. In late November 2001, a decision by the EU Permanent Veterinary Committee to recognize Poland as free from classical swine fever may help Polish pork exports and improve the import market perception of Polish meat. Exports to Russia account for over two-thirds of Poland's total, and most of this is pork sausage. Pork exports to the United States are growing, especially canned hams. In 2001, U.S. pork exports to Poland totaled \$882,000.

Poland's Consumption Rises With Production as Exports Slip Which are Dependent Upon Russia



Poland's Pork Imports Not a Significant Part of Consumption and Sourced Mainly from the EU



Poland
PORK IMPORTS
(in metric tons)

Fresh/Chilled

Origin	1995	1996	1997	1998	1999	2000
Czech Rep.	0	0	0	0	960	0
EU-15	23,328	16,574	16,214	44,554	21,726	22,548
Hungary	0	508	194	68	1,066	39
United States	0	0	0	0	44	0
Others	32	125	474	45	486	21
Total	23,360	17,207	16,882	44,667	24,282	22,608

US market share	0%	0%	0%	0%	0%	0%
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Frozen

Origin	1995	1996	1997	1998	1999	2000
Canada	3,116	6,552	5,268	4,774	2,885	2,064
EU-15	11,558	4,913	3,107	5,093	7,449	6,986
Hungary	5,265	6,792	3,179	1,713	6,475	3,565
Norway	0	0	0	0	1,183	301
United States	2,549	929	341	392	23	0
Others	330	130	299	20	186	164
Total	22,818	19,316	12,194	11,992	18,201	13,080

US market share	11%	5%	3%	3%	0%	0%
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Processed

Origin	1995	1996	1997	1998	1999	2000
Czech Rep.	57	0	71	42	42	0
EU-15	443	1,473	1,599	166	99	101
Russia	0	0	0	1	0	19
United States	0	14	0	6	0	7
Others	58	107	1,112	14	2	3
Total	558	1,594	2,782	229	143	130

US market share	0%	1%	0%	3%	0%	5%
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Grand Total	46,736	38,117	31,858	56,888	42,626	35,818
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US market share	5%	2%	1%	1%	0%	0%
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Source: U.N. Statistical Office for 1995- 1997 and Polish Central Statistical Office for 1998 - 2000

Poland
PORK EXPORTS
(in metric tons)

Fresh/Chilled

Destination	1995	1996	1997	1998	1999	2000
Belarus	1,016	1,568	0	4	18	36
Czech Rep.	381	0	0	0	0	0
Estonia	0	224	0	3	44	1,206
Latvia	739	604	486	764	518	349
EU-15	0	0	19	25	31	45
Romania	0	0	0	31	39	58
Russia	2,427	2,867	2,905	1,034	3,031	680
Ukraine	235	213	259	91	116	6
Uzbekistan	0	0	0	0	0	200
Others	163	281	192	61	291	128
Total	4,961	5,757	3,861	2,013	4,088	2,708

Frozen

Destination	1995	1996	1997	1998	1999	2000
Armenia	0	0	0	0	117	240
Belarus	1,504	3,078	5,993	1,288	4,738	4,821
Bulgaria	0	0	0	128	1,250	213
Estonia	0	808	258	70	299	1,350
EU-15	591	569	179	26	125	30
Latvia	2,633	4,276	4,472	2,262	6,250	4,087
Lithuania	660	228	200	33	1,587	991
Moldova	0	0	0	135	521	121
Romania	0	80	0	36	1,493	1,449
Russia	17,075	27,939	21,525	8,665	64,816	42,209
South Korea	0	0	0	7	24	134
Ukraine	377	650	1,657	1,124	3,691	787
Others	742	1,462	816	291	921	525
Total	23,582	39,090	35,100	14,065	85,832	56,957

Processed, including sausage

Destination	1995	1996	1997	1998	1999	2000
Azerbaijan	52	1,257	4,232	2,613	1,538	964
Belarus	1,614	1,164	726	572	1,387	271
Estonia	0	53	0	1,310	230	257
EU-15	2,662	2,032	2,285	2,687	2,878	2,716
Latvia	512	299	520	753	2,406	1,435

Lithuania	37	0	0	87	1,099	185
Moldova	0	233	1,203	4,561	4,489	3,476
Russia	42,416	85,113	159,674	128,722	62,795	39,980
South Korea	34	0	0	41	56	130
Ukraine	1,293	4,959	4,275	4,456	5,640	5,647
United States	3,371	3,118	4,539	5,915	6,965	7,101
Others	653	1,062	2,088	1,619	1,587	1,594
Total	52,644	99,290	179,542	153,336	91,070	63,756
Grand Total	81,187	144,137	218,503	169,414	180,990	123,421
Share to U.S.	4%	2%	2%	3%	4%	6%

Source: U.N. Statistical Office for 1995- 1997 and Polish Central Statistical Office for 1998 - 2000